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## **Poland**

## **Livestock and Products**

## **Annual**

## **2002**

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### **Report Highlights:**

**It is estimated that Poland's red meat output will grow in 2002 and 2003 about 3 percent per year. Increase stems from the expected higher output of pork which will offset lower production of beef. In May and August of 2002 Poland reported its first two cases of BSE which will result in a 13 percent reduction of beef exports in 2002. Both imports and exports of pork are expected to increase in 2002 stimulated by a duty free import quota for pork imported from the EU and higher production and export subsidies.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
Warsaw [PL1], PL

|  |                    |
|--|--------------------|
| I. Situation and Outlook .....                 | <a href="#">1</a>  |
| BEEF .....                                     | <a href="#">1</a>  |
| Trade Prospects .....                          | <a href="#">2</a>  |
| Trade Policy .....                             | <a href="#">3</a>  |
| SWINE .....                                    | <a href="#">3</a>  |
| Trade .....                                    | <a href="#">3</a>  |
| Red Meat Market Interventions .....            | <a href="#">4</a>  |
| Other reports of interest .....                | <a href="#">4</a>  |
| II. Statistical Tables .....                   | <a href="#">5</a>  |
| Animal Numbers, Cattle .....                   | <a href="#">5</a>  |
| Import Trade Matrix, Live Cattle .....         | <a href="#">6</a>  |
| Export Trade Matrix, Live Cattle .....         | <a href="#">7</a>  |
| Prices Table, Live Cattle .....                | <a href="#">8</a>  |
| Meat, Beef and Veal .....                      | <a href="#">9</a>  |
| Import Trade Matrix, Meat, Beef and Veal ..... | <a href="#">10</a> |
| Export Trade Matrix, Meat, Beef and Veal ..... | <a href="#">11</a> |
| Prices Table, Beef .....                       | <a href="#">12</a> |
| Animal Numbers, Swine .....                    | <a href="#">13</a> |
| Import Trade Matrix, Live Hogs .....           | <a href="#">14</a> |
| Export Trade Matrix, Live Hogs .....           | <a href="#">15</a> |
| Prices Table, Live Hogs .....                  | <a href="#">16</a> |
| Meat, Swine .....                              | <a href="#">17</a> |
| Import Trade Matrix, Meat, Swine .....         | <a href="#">18</a> |
| Export Trade Matrix, Meat, Swine .....         | <a href="#">19</a> |
| Prices Table, Pork .....                       | <a href="#">20</a> |
| Tariff Rate Table .....                        | <a href="#">21</a> |
| Average Meat Consumption .....                 | <a href="#">22</a> |

## **I. Situation and Outlook**

It is estimated that Poland's red meat output will grow in 2002 and 2003 about 3 percent per year. Increase stems from the expected higher output of pork which will offset lower production of beef in this and next year. Feed costs are expected to remain stable in the second half of 2002 and the first six months of 2003; an estimated four percent decrease in the domestic grain crop this year will be offset by high grain stocks from last year. Polish exports of pork are expected to increase in 2002 and 2003 due to higher output and export subsidy program introduced by the Government of Poland (GOP). The U.S. is expected to remain a major supplier of beef tripe to Poland in 2002 and 2003 as well as small amounts of high quality beef steaks and pork hams for processing.

### **BEEF**

Cattle inventories will continue to decrease in the second half of 2002 and in 2003. The decrease of inventories results mainly from reduction of young stock, as beef production is considered unprofitable by farmers due to low prices for slaughter cattle. The decrease of dairy cow inventories is an effect of the process of improvement of genetics of dairy herds resulting in a decrease of numbers but increase of milk yield per cow. Farmers produce young fattening cattle for export as a side enterprise of their dairy herds. After a drop in 2001, exports of young cattle are expected to rebound in 2002 and 2003 due to strong demand from Italy and former Yugoslavia countries. So far, exports of beef on hoof did not suffer from the BSE cases recorded in Poland on May and August of 2002. Among countries importing young fattening cattle from Poland, only Israel banned imports from Poland. (See Gain Report #PL2012 on Impact of Outbreak of BSE on Beef Consumption).

Beef production will likely decrease by 8 percent in 2002 and an additional 5 percent in 2003 due to reduced cattle inventories and slaughter. Production of beef has been decreasing since 1998 as consumers tended to avoid beef as a result of the fear of BSE and switched to poultry meat as a substitute. Demand for imported beef also remains low. It is estimated that the outbreak of BSE will decrease domestic beef consumption in 2002 by six percent but consumption of beef in 2003 will remain at the 2002 level. Most domestically produced beef is added to pork sausages or canned meat products.

### **Trade Prospects**

#### **Imports**

Poland imports very small amounts of beef, mainly corn-fed U.S. beef. High quality corn-fed beef is not produced in Poland, so U.S. choice beef has found a niche in premier Polish restaurants. The market could potentially expand to large supermarkets which currently dominate the Polish food retail sector. In the first quarter of 2002, Poland imported 3,060 kilograms of U.S. choice beef. Poland remains a major importer of beef offal importing approximately 10,000 -12,000 tons annually. The United States and Australia are the major suppliers of beef tripe.

Poland is aiming to join the European Union in 2004. The EU requires that Poland introduces all veterinary and sanitary regulations used currently by the EU no later than 6 to 12 months before accession. This requirement could block imports of the U.S. origin beef and beef offal by Poland sometime in 2003, except from EU approved facilities, due to current U.S. market access constraints to EU markets.

Poland represents a potential market for U.S. dairy genetics, primarily semen and embryos (See Gain Report #PL2021). Since July 2001, the Polish market opened for exports of U.S. dairy heifers and young breeding bulls. However, exports have been hampered by rejection of a U.S. shipment in May 2002. In July 2002, Polish veterinary authorities lifted the ban originally instituted as a result of BSE and FMD outbreaks on imports of breeding dairy heifers from West European countries. Dutch, French and German Holstein heifers successfully compete with U.S. breeding heifers on the Polish market due to lower price caused by lower transportation costs. However, given the EU's current veterinary restrictions on U.S. live animal imports and the probability that Poland will become part of the EU in 2004, U.S. live breeding stock will be barred entry upon Polish EU accession.

## Exports

On May 2 and August 15, 2002, Poland reported its first two BSE cases which resulted in import bans introduced by Russia (with an exception of boneless beef), **Lithuania**, Estonia, Croatia, Romania, Bulgaria, Slovakia and Ukraine. As a result, beef exports are expected to decrease by 13 percent in 2002 and remain at this level in 2003. Poland is attempting to upgrade its meat processing sector in order to improve export possibilities to EU member states both before and after accession.

## Trade Policy

Since 1995, Poland has maintained a tariff rate quota for beef. The quota for 2002 is 23,195 tons (5,650 MT for HTS 0201 and 17,545 MT for HTS 0202). The tariff on in-quota trade for fresh, chilled and frozen beef remains at 30 percent. The over-quota tariff is 45 percent. All meat imported into Poland must be accompanied by a health certificate issued by a government-approved veterinarian from the exporting country. Products also must bear a label in Polish with the date of production clearly stated. There is zero tolerance for the presence of hormones in imported beef, but Polish veterinary authorities do not require that beef originates from cattle which have not been treated with growth promoting hormones. Each imported shipment of beef is tested.

In addition, suppliers should check with importers regarding Polish standards for products sold in Poland and stored in-country for transshipment. Poland has a set of quality standards for storage conditions of meat and meat products and validity of the products depending on conditions and temperature of storage. (See Gain Report #PL1002 on Polish Norms).

## SWINE

Pork remains the primary meat produced in Poland. In 2003, pork production is expected to increase due to lower feed grain prices, growing inventories and slaughter of hogs as well as government intervention on the pork market. Hog inventories are expected to grow until mid 2003 due to expected good supplies of feed. Consequently, hog slaughter and pork output is expected to increase in 2002 and 2003. The current situation on the pork market is created by several price depressing factors. An increase in pork output in the first half of 2002 coincided with the opening of a duty free import quota for pork imported from the EU. Meanwhile, some consumers began to substitute low cost domestically produced poultry meat for pork. In addition, cheap feed grain stimulated hog production.

In 2002, pork consumption is expected to increase because of lower prices resulting from growing output. It is estimated that in 2002 average per capita consumption of pork will amount to 39.0 kilograms compared to 38.2

kilograms in 2001. By comparison, it is estimated that in 2002 average per capita consumption of beef will amount to 5.0 kilograms compared to 5.5 kilograms in 2001 while consumption of poultry meat is expected to rise from 16.5 kilograms in 2001 to 17.0 kilograms in 2002.

## Trade

### Imports

In 2002, pork imports are expected to increase despite higher domestic output mostly because of a duty free import quota for 34,500 tons of pork imported from the EU. The general import quota for pork in 2002 is 46,480 tons (HTS 0203) which could be utilized by all exporters including EU countries should they fulfill their duty free quota. The within quota tariff is 30 percent and applies to all countries including the EU. The over-quota tariff is 76 plus maximum 0.9 EUR/kg. Poland's live hog imports are limited to breeding hogs mainly from France.

### Exports

It is estimated that exports of pork and pork products in 2002 and 2003 will increase because of higher output and a governmental export subsidy program announced in mid 2002. In October 2001, the EU announced Poland as classical swine fever free which allowed Polish pork exports to the EU. The trade liberalization agreement between Poland and the EU opened a duty free quota for Polish pork exports to the EU amounting to 45,000 tons annually.

Exports of canned hams to the United States in 2002 are expected to remain at the 2001 level. Canned hams and shoulders exported to the United States are produced in USDA-inspected plants and are generally of higher quality than available on the domestic market.

### - Red Meat Market Interventions

On June 11, 2002, an additional allocation of funds for intervention on the red meat market was announced. (See Gain Report #PL2014, Grain and Meat Intervention's Limited Impact). The Agricultural Market Agency (AMA) of the Ministry of Agriculture will be eligible to make additional intervention procurements of 55,000 tons of pork halves and a new 15,000 tons of boneless beef. In addition, the AMA will be responsible for allocation of export subsidies worth approximately \$40 million for pork exports. The amount of pork exported with subsidies will depend on the subsidy per kilogram which will be based on the public tender. These are the first such export subsidies since 1999 in the aftermath of the collapse of the Russian market. From January 1 until May 10, 2002, the AMA procured 68,800 tons of pork halves for stocks and export. The AMA is responsible for maintaining governmental stocks of red meat and intervening on the agricultural market as needed.

*Other reports of interest:*

- Gain Report #PL1002 "Polish Norms"
- Gain Report #PL2017 "Poultry Annual 2002"
- Gain Report #PL1038 "Dairy Annual 2001"
- Gain Report #PL2010 "Grain & Feed Annual 2002"
- Gain Report #PL2014 "Grain and Meat Intervention's Limited Impact"
- Gain Report #PL2012 "Impact of Outbreak of BSE on Beef Consumption and Exports"
- Gain Report #PL2021 "Product Brief - Dairy Genetics"

## **II. Statistical Tables**

## Animal Numbers, Cattle

|                             |                           |         |             |         |             |         |
|-----------------------------|---------------------------|---------|-------------|---------|-------------|---------|
| PSD Table                   |                           |         |             |         |             |         |
| Country                     | Poland                    |         |             |         |             |         |
| Commodity                   | Animal<br>Numbers, Cattle |         |             |         | (1000 HEAD) |         |
|                             | Revised                   | 2001    | Preliminary | 2002    | Forecast    | 2003    |
|                             | Old                       | New     | Old         | New     | Old         | New     |
| Market Year Begin           |                           | 01/2001 |             | 01/2002 |             | 01/2003 |
| Total Cattle Beg. Stks      | 5722                      | 5722    | 5500        | 5499    | 5300        | 5350    |
| Dairy Cows Beg. Stocks      | 3130                      | 3130    | 3100        | 3100    | 0           | 3000    |
| Beef Cows Beg. Stocks       | 0                         | 0       | 0           | 0       | 0           | 0       |
| Production (Calf Crop)      | 2600                      | 2600    | 2500        | 2500    | 0           | 2400    |
| Intra EC Imports            | 0                         | 0       | 0           | 0       | 0           | 0       |
| Other Imports               | 0                         | 0       | 0           | 0       | 0           | 0       |
| TOTAL Imports               | 0                         | 0       | 0           | 0       | 0           | 0       |
| TOTAL SUPPLY                | 8322                      | 8322    | 8000        | 7999    | 5300        | 7750    |
| Intra EC Exports            | 0                         | 0       | 0           | 0       | 0           | 0       |
| Other Exports               | 410                       | 421     | 400         | 430     | 0           | 480     |
| TOTAL Exports               | 410                       | 421     | 400         | 430     | 0           | 480     |
| Cow Slaughter               | 200                       | 200     | 150         | 200     | 0           | 200     |
| Calf Slaughter              | 750                       | 750     | 750         | 650     | 0           | 650     |
| Other Slaughter             | 1350                      | 1350    | 1300        | 1270    | 0           | 1150    |
| Total Slaughter             | 2300                      | 2300    | 2200        | 2120    | 0           | 2000    |
| Loss                        | 112                       | 102     | 100         | 99      | 0           | 70      |
| Ending Inventories          | 5500                      | 5499    | 5300        | 5350    | 0           | 5200    |
| TOTAL DISTRIBUTION          | 8322                      | 8322    | 8000        | 7999    | 0           | 7750    |
| Calendar Yr. Imp. from U.S. | 0                         | 0       | 0           | 0       | 0           | 0       |
| Calendar Yr. Exp. to U.S.   | 0                         | 0       | 0           | 0       | 0           | 0       |

## Import Trade Matrix, Live Cattle

|                     |                           |      |               |         |         |
|---------------------|---------------------------|------|---------------|---------|---------|
| Import Trade Matrix |                           |      |               |         |         |
| Country             | Poland                    |      | Units:        | Head    |         |
| Commodity           | Animal Numbers,<br>Cattle |      | Partial Begin | Jan     |         |
|                     |                           |      | Partial End   | March   |         |
| Imports for:        | 2001                      | 2002 | 2003          | 2001    | 2002    |
|                     | Full                      | Full | Full          | Partial | Partial |
| U.S.                | 13                        | 25   | 50            | 0       | 6       |
| Others              |                           |      |               |         |         |
| Austria             | 424                       | 500  | 100           | 26      | 0       |
| The Netherlands     | 190                       | 2000 | 2500          | 0       | 0       |
| Czech Republic      | 92                        | 100  | 100           | 92      | 0       |
| Germany             | 75                        | 1500 | 2000          | 0       | 0       |
| Hungary             | 65                        | 0    | 0             | 33      | 0       |
| Italy               | 62                        | 150  | 200           | 0       | 39      |
| Estonia             | 42                        | 50   | 0             | 0       | 46      |
| Bosnia&Herceg.      | 36                        | 0    | 0             | 0       | 0       |
| Denmark             | 4                         | 500  | 1000          | 0       | 0       |
| France              | 0                         | 500  | 1000          | 0       | 0       |
| Total for Others    | 990                       | 5300 | 6900          | 151     | 85      |
| Others not Listed   | 0                         | 100  | 100           | 0       | 0       |
| Grand Total         | 1003                      | 5425 | 7050          | 151     | 91      |

## Export Trade Matrix, Live Cattle

|                     |        |  |        |      |  |
|---------------------|--------|--|--------|------|--|
| Export Trade Matrix |        |  |        |      |  |
| Country             | Poland |  | Units: | Head |  |



| Commodity         | Animal Numbers,<br>Cattle |        | Partial Begin | Jan     |         |
|-------------------|---------------------------|--------|---------------|---------|---------|
|                   |                           |        | Partial End   | March   |         |
| Exports for:      | 2001                      | 2002   | 2003          | 2001    | 2002    |
|                   | Full                      | Full   | Full          | Partial | Partial |
| U.S.              |                           |        |               |         |         |
| Others            |                           |        |               |         |         |
| Italy             | 239341                    | 240000 | 250000        | 27331   | 44894   |
| Croatia           | 38554                     | 50000  | 50000         | 3832    | 16251   |
| Bosnia&Herceg.    | 42267                     | 55000  | 60000         | 0       | 18144   |
| Israel            | 49855                     | 20000  | 50000         | 13578   | 16451   |
| The Netherlands   | 11669                     | 10000  | 11000         | 4761    | 4547    |
| Slovenia          | 5178                      | 4000   | 4000          | 1781    | 992     |
| Germany           | 8590                      | 12000  | 10000         | 1560    | 3510    |
| Russia            | 4397                      | 4000   | 5000          | 0       | 1873    |
| Spain             | 11709                     | 30000  | 35000         | 648     | 8982    |
| France            | 3200                      | 0      | 0             | 0       | 0       |
| Total for Others  | 376206                    | 375000 | 425000        | 49659   | 99393   |
| Others not Listed | 5943                      | 5000   | 5000          | 4916    | 1743    |
| Grand Total       | 382149                    | 380000 | 430000        | 54575   | 101136  |

## Prices Table, Live Cattle

|              |                           |  |  |
|--------------|---------------------------|--|--|
| Prices Table |                           |  |  |
| Country      | Poland                    |  |  |
| Commodity    | Animal Numbers,<br>Cattle |  |  |

| Prices in     | zlotys | per uom              | kilogram of live weight |
|---------------|--------|----------------------|-------------------------|
| Year          | 2001   | 2002                 | % Change                |
| Jan           | 2.89   | 2.91                 | 0.69%                   |
| Feb           | 2.66   | 2.91                 | 9.40%                   |
| Mar           | 2.53   | 2.89                 | 14.23%                  |
| Apr           | 2.89   | 2.87                 | -0.69%                  |
| May           | 2.92   | 2.75                 | -5.82%                  |
| Jun           | 2.87   |                      | -100.00%                |
| Jul           | 2.87   |                      | -100.00%                |
| Aug           | 2.96   |                      | -100.00%                |
| Sep           | 2.97   |                      | -100.00%                |
| Oct           | 2.95   |                      | -100.00%                |
| Nov           | 2.86   |                      | -100.00%                |
| Dec           | 2.91   |                      | -100.00%                |
| Exchange Rate | 4.23   | Local currency/US \$ |                         |

## Meat, Beef and Veal

|           |                     |      |             |      |               |             |
|-----------|---------------------|------|-------------|------|---------------|-------------|
| PSD Table |                     |      |             |      |               |             |
| Country   | Poland              |      |             |      |               |             |
| Commodity | Meat, Beef and Veal |      |             |      | (1000 MT CWE) | (1000 HEAD) |
|           | Revised             | 2001 | Preliminary | 2002 | Forecast      | 2003        |
|           | Old                 | New  | Old         | New  | Old           | New         |

| Market Year Begin           |      | 01/2001 |      | 01/2002 |    | 01/2003 |
|-----------------------------|------|---------|------|---------|----|---------|
| Slaughter (Reference)       | 2300 | 2300    | 2200 | 2120    | 0  | 2000    |
| Beginning Stocks            | 20   | 20      | 25   | 45      | 25 | 64      |
| Production                  | 305  | 305     | 290  | 280     | 0  | 265     |
| Intra EC Imports            | 0    | 0       | 0    | 0       | 0  | 0       |
| Other Imports               | 0    | 0       | 0    | 0       | 0  | 0       |
| TOTAL Imports               | 0    | 0       | 0    | 0       | 0  | 0       |
| TOTAL SUPPLY                | 325  | 325     | 315  | 325     | 25 | 329     |
| Intra EC Exports            | 0    | 0       | 0    | 0       | 0  | 0       |
| Other Exports               | 38   | 30      | 40   | 26      | 0  | 26      |
| TOTAL Exports               | 38   | 30      | 40   | 26      | 0  | 26      |
| Human Dom. Consumption      | 246  | 250     | 238  | 235     | 0  | 230     |
| Other Use, Losses           | 16   | 0       | 12   | 0       | 0  | 0       |
| TOTAL Dom. Consumption      | 262  | 250     | 250  | 235     | 0  | 230     |
| Ending Stocks               | 25   | 45      | 25   | 64      | 0  | 73      |
| TOTAL DISTRIBUTION          | 325  | 325     | 315  | 325     | 0  | 329     |
| Calendar Yr. Imp. from U.S. | 0    | 0       | 0    | 0       | 0  | 0       |
| Calendar Yr. Exp. to U.S.   | 0    | 0       | 0    | 0       | 0  | 0       |

### Import Trade Matrix, Meat, Beef and Veal

|                     |                     |      |               |         |         |
|---------------------|---------------------|------|---------------|---------|---------|
| Import Trade Matrix |                     |      |               |         |         |
| Country             | Poland              |      | Units:        | Tons    |         |
| Commodity           | Meat, Beef and Veal |      | Partial Begin | Jan     |         |
|                     |                     |      | Partial End   | March   |         |
| Imports for:        | 2001                | 2002 | 2003          | 2001    | 2002    |
|                     | Full                | Full | Full          | Partial | Partial |

|                   |    |    |    |    |    |
|-------------------|----|----|----|----|----|
| U.S.              | 5  | 15 | 20 | 1  | 4  |
| Others            |    |    |    |    |    |
| Hungary           | 21 | 5  | 0  | 0  | 1  |
| Slovakia          | 11 | 0  | 0  | 0  | 0  |
| Sweden            | 26 | 30 | 0  | 21 | 7  |
| Austria           | 1  | 0  | 0  | 0  | 0  |
|                   |    |    |    |    |    |
|                   |    |    |    |    |    |
|                   |    |    |    |    |    |
|                   |    |    |    |    |    |
|                   |    |    |    |    |    |
|                   |    |    |    |    |    |
| Total for Others  | 59 | 35 | 0  | 21 | 8  |
| Others not Listed | 1  | 10 | 5  | 2  | 1  |
| Grand Total       | 65 | 60 | 25 | 24 | 13 |

## Export Trade Matrix, Meat, Beef and Veal

|                     |                     |      |               |         |         |
|---------------------|---------------------|------|---------------|---------|---------|
| Export Trade Matrix |                     |      |               |         |         |
| Country             | Poland              |      | Units:        | Tons    |         |
| Commodity           | Meat, Beef and Veal |      | Partial Begin | Jan     |         |
|                     |                     |      | Partial End   | March   |         |
| Exports for:        | 2001                | 2002 | 2003          | 2001    | 2002    |
|                     | Full                | Full | Full          | Partial | Partial |
| U.S.                |                     |      |               |         |         |

|                   |       |       |       |      |       |
|-------------------|-------|-------|-------|------|-------|
| Others            |       |       |       |      |       |
| Italy             | 5951  | 6000  | 6000  | 1207 | 1810  |
| Germany           | 1929  | 2000  | 2500  | 156  | 672   |
| Sweden            | 1707  | 1800  | 2000  | 486  | 506   |
| Russia            | 7747  | 8500  | 5000  | 127  | 6585  |
| Romania           | 1928  | 2000  | 1000  | 0    | 1412  |
| Macedonia         | 1920  | 2000  | 2500  | 225  | 1931  |
| Bosnia&Herceg.    | 250   | 150   | 500   | 20   | 102   |
| Ukraine           | 1233  | 250   | 1000  | 0    | 158   |
| Bulgaria          | 420   | 2     | 0     | 120  | 2     |
| Estonia           | 1821  | 400   | 0     | 1180 | 356   |
| Total for Others  | 24906 | 23102 | 20500 | 3521 | 13534 |
| Others not Listed | 3841  | 1900  | 4500  | 901  | 1967  |
| Grand Total       | 28747 | 25002 | 25000 | 4422 | 15501 |

### Prices Table, Beef

|              |                     |         |                                    |
|--------------|---------------------|---------|------------------------------------|
| Prices Table |                     |         |                                    |
| Country      | Poland              |         |                                    |
| Commodity    | Meat, Beef and Veal |         |                                    |
| Prices in    | zlotys              | per uom | kilogram of roas<br>beef - bone in |
|              |                     |         |                                    |
| Year         | 2001                | 2002    | % Change                           |
| Jan          | 10.72               | 10.74   | 0.19%                              |

|               |       |                         |          |
|---------------|-------|-------------------------|----------|
| Feb           | 10.67 | 10.77                   | 0.94%    |
| Mar           | 10.56 | 10.78                   | 2.08%    |
| Apr           | 10.44 | 10.79                   | 3.35%    |
| May           | 10.42 |                         | -100.00% |
| Jun           | 10.4  |                         | -100.00% |
| Jul           | 10.47 |                         | -100.00% |
| Aug           | 10.55 |                         | -100.00% |
| Sep           | 10.67 |                         | -100.00% |
| Oct           | 10.7  |                         | -100.00% |
| Nov           | 10.74 |                         | -100.00% |
| Dec           | 10.75 |                         | -100.00% |
|               |       |                         |          |
| Exchange Rate | 4.23  | Local currency/US<br>\$ |          |

### Animal Numbers, Swine

|                        |                          |         |             |         |             |         |
|------------------------|--------------------------|---------|-------------|---------|-------------|---------|
| PSD Table              |                          |         |             |         |             |         |
| Country                | Poland                   |         |             |         |             |         |
| Commodity              | Animal<br>Numbers, Swine |         |             |         | (1000 HEAD) |         |
|                        | Revised                  | 2001    | Preliminary | 2002    | Forecast    | 2003    |
|                        | Old                      | New     | Old         | New     | Old         | New     |
| Market Year Begin      |                          | 01/2001 |             | 01/2002 |             | 01/2003 |
| TOTAL Beginning Stocks | 16988                    | 16988   | 17400       | 17494   | 18000       | 18500   |
| Sow Beginning Stocks   | 1650                     | 16500   | 1750        | 1750    | 0           | 1850    |
| Production (Pig Crop)  | 23250                    | 23250   | 24400       | 24500   | 0           | 25500   |

|                             |       |       |       |       |       |       |
|-----------------------------|-------|-------|-------|-------|-------|-------|
| Intra EC Imports            | 0     | 0     | 0     | 0     | 0     | 0     |
| Other Imports               | 0     | 0     | 0     | 0     | 0     | 0     |
| TOTAL Imports               | 0     | 0     | 0     | 0     | 0     | 0     |
| TOTAL SUPPLY                | 40238 | 40238 | 41800 | 41994 | 18000 | 44000 |
| Intra EC Exports            | 0     | 0     | 0     | 0     | 0     | 0     |
| Other Exports               | 3     | 5     | 2     | 6     | 0     | 6     |
| TOTAL Exports               | 3     | 5     | 2     | 6     | 0     | 6     |
| Sow Slaughter               | 350   | 350   | 300   | 300   | 0     | 350   |
| OTHER SLAUGHTER             | 20600 | 20600 | 21700 | 22000 | 0     | 23000 |
| Total Slaughter             | 20950 | 20950 | 22000 | 22300 | 0     | 23350 |
| Loss                        | 1885  | 1789  | 1798  | 1188  | 0     | 1644  |
| Ending Inventories          | 17400 | 17494 | 18000 | 18500 | 0     | 19000 |
| TOTAL DISTRIBUTION          | 40238 | 40238 | 41800 | 41994 | 0     | 44000 |
| Calendar Yr. Imp. from U.S. | 0     | 0     | 0     | 0     | 0     | 0     |
| Calendar Yr. Exp. to U.S.   | 0     | 0     | 0     | 0     | 0     | 0     |

### Import Trade Matrix, Live Hogs

|                     |                          |      |               |         |         |
|---------------------|--------------------------|------|---------------|---------|---------|
| Import Trade Matrix |                          |      |               |         |         |
| Country             | Poland                   |      | Units:        | Head    |         |
| Commodity           | Animal Numbers,<br>Swine |      | Partial Begin | January |         |
|                     |                          |      | Partial End   | March   |         |
| Imports for:        | 2001                     | 2002 | 2003          | 2001    | 2002    |
|                     | Full                     | Full | Full          | Partial | Partial |
| U.S.                | 55                       | 0    | 0             | 55      | 0       |
| Others              |                          |      |               |         |         |
| France              | 220                      | 200  | 200           | 220     | 0       |
| Denmark             | 23                       | 20   | 50            | 0       | 15      |

|                   |     |     |     |     |    |
|-------------------|-----|-----|-----|-----|----|
| Japan             | 0   | 12  | 0   | 0   | 12 |
| Canada            | 80  | 0   | 0   | 0   | 0  |
| Sweden            | 19  | 0   | 0   | 0   | 0  |
|                   |     |     |     |     |    |
|                   |     |     |     |     |    |
|                   |     |     |     |     |    |
|                   |     |     |     |     |    |
|                   |     |     |     |     |    |
| Total for Others  | 342 | 232 | 250 | 220 | 27 |
| Others not Listed | 0   | 30  | 50  | 0   | 0  |
| Grand Total       | 397 | 262 | 300 | 275 | 27 |

## Export Trade Matrix, Live Hogs

|                     |                          |      |               |         |         |
|---------------------|--------------------------|------|---------------|---------|---------|
| Export Trade Matrix |                          |      |               |         |         |
| Country             | Poland                   |      | Units:        | Head    |         |
| Commodity           | Animal Numbers,<br>Swine |      | Partial Begin | January |         |
|                     |                          |      | Partial End   | March   |         |
| Exports for:        | 2001                     | 2002 | 2003          | 2001    | 2002    |
|                     | Full                     | Full | Full          | Partial | Partial |
| U.S.                |                          |      |               |         |         |
| Others              |                          |      |               |         |         |
| Russia              | 1003                     | 1000 | 1000          | 573     | 0       |
| Lithuania           | 991                      | 1000 | 1000          | 0       | 378     |
| Romania             | 0                        | 100  | 100           | 0       | 0       |
| Byelorussia         | 74                       | 100  | 100           | 0       | 16      |



|                   |      |      |      |     |     |
|-------------------|------|------|------|-----|-----|
| Bulgaria          | 0    | 50   | 50   | 0   | 1   |
| Ukraine           | 782  | 1000 | 1000 | 120 | 148 |
| Croatia           | 1775 | 2000 | 2500 | 0   | 52  |
| Bosnia&Herceg.    | 270  | 250  | 250  | 0   | 0   |
| Hungary           | 128  | 150  | 150  | 0   | 0   |
| Thailand          | 114  | 0    | 0    | 114 | 0   |
| Total for Others  | 5137 | 5650 | 6150 | 807 | 595 |
| Others not Listed | 0    | 50   | 50   | 0   | 0   |
| Grand Total       | 5137 | 5700 | 6200 | 807 | 595 |

## Prices Table, Live Hogs

|              |                          |         |                            |
|--------------|--------------------------|---------|----------------------------|
| Prices Table |                          |         |                            |
| Country      | Poland                   |         |                            |
| Commodity    | Animal Numbers,<br>Swine |         |                            |
| Prices in    | zlotys                   | per uom | kilogram of live<br>weight |
|              |                          |         |                            |
| Year         | 2001                     | 2002    | % Change                   |
| Jan          | 4.04                     | 4.08    | 0.99%                      |
| Feb          | 4                        | 3.94    | -1.50%                     |
| Mar          | 4.34                     | 4       | -7.83%                     |
| Apr          | 4.51                     | 3.79    | -15.96%                    |
| May          | 4.2                      | 3.53    | -15.95%                    |
| Jun          | 4.29                     |         | -100.00%                   |
| Jul          | 4.43                     |         | -100.00%                   |
| Aug          | 4.63                     |         | -100.00%                   |

|               |      |                         |          |
|---------------|------|-------------------------|----------|
| Sep           | 4.73 |                         | -100.00% |
| Oct           | 4.74 |                         | -100.00% |
| Nov           | 4.56 |                         | -100.00% |
| Dec           | 4.51 |                         | -100.00% |
|               |      |                         |          |
| Exchange Rate | 4.18 | Local currency/US<br>\$ |          |

## Meat, Swine

|                        |             |         |             |         |                          |         |
|------------------------|-------------|---------|-------------|---------|--------------------------|---------|
| PSD Table              |             |         |             |         |                          |         |
| Country                | Poland      |         |             |         |                          |         |
| Commodity              | Meat, Swine |         |             |         | (1000 MT CWE)(1000 HEAD) |         |
|                        | Revised     | 2001    | Preliminary | 2002    | Forecast                 | 2003    |
|                        | Old         | New     | Old         | New     | Old                      | New     |
| Market Year Begin      |             | 01/2001 |             | 01/2002 |                          | 01/2003 |
| Slaughter (Reference)  | 20950       | 20950   | 22000       | 22300   | 0                        | 23350   |
| Beginning Stocks       | 36          | 36      | 30          | 30      | 30                       | 30      |
| Production             | 1550        | 1550    | 1620        | 1630    | 0                        | 1710    |
| Intra EC Imports       | 0           | 0       | 0           | 0       | 0                        | 0       |
| Other Imports          | 22          | 19      | 17          | 25      | 0                        | 18      |
| TOTAL Imports          | 22          | 19      | 17          | 25      | 0                        | 18      |
| TOTAL SUPPLY           | 1608        | 1605    | 1667        | 1685    | 30                       | 1758    |
| Intra EC Exports       | 0           | 0       | 0           | 0       | 0                        | 0       |
| Other Exports          | 102         | 88      | 110         | 105     | 0                        | 115     |
| TOTAL Exports          | 102         | 88      | 110         | 105     | 0                        | 115     |
| Human Dom. Consumption | 1447        | 1487    | 1497        | 1550    | 0                        | 1610    |

|                             |      |      |      |      |   |      |
|-----------------------------|------|------|------|------|---|------|
| Other Use, Losses           | 29   | 0    | 30   | 0    | 0 | 0    |
| TOTAL Dom. Consumption      | 1476 | 1487 | 1527 | 1550 | 0 | 1610 |
| Ending Stocks               | 30   | 30   | 30   | 30   | 0 | 33   |
| TOTAL DISTRIBUTION          | 1608 | 1605 | 1667 | 1685 | 0 | 1758 |
| Calendar Yr. Imp. from U.S. | 1    | 0    | 2    | 0    | 0 | 0    |
| Calendar Yr. Exp. to U.S.   | 8    | 7    | 8    | 7    | 0 | 8    |

### Import Trade Matrix, Meat, Swine

|                     |             |       |               |         |         |
|---------------------|-------------|-------|---------------|---------|---------|
| Import Trade Matrix |             |       |               |         |         |
| Country             | Poland      |       | Units:        | Tons    |         |
| Commodity           | Meat, Swine |       | Partial Begin | January |         |
|                     |             |       | Partial End   | March   |         |
| Imports for:        | 2001        | 2002  | 2003          | 2001    | 2002    |
|                     | Full        | Full  | Full          | Partial | Partial |
| U.S.                | 462         | 450   | 500           | 436     | 0       |
| Others              |             |       |               |         |         |
| Denmark             | 8673        | 10000 | 8000          | 2619    | 6375    |
| Hungary             | 1253        | 1500  | 1000          | 371     | 458     |
| Belgium             | 1048        | 2000  | 1000          | 342     | 886     |
| Canada              | 4491        | 4500  | 3000          | 288     | 216     |
| France              | 794         | 2500  | 1000          | 172     | 1268    |
| Italy               | 61          | 0     | 0             | 0       | 0       |
| Ireland             | 640         | 500   | 300           | 228     | 192     |
| Germany             | 767         | 800   | 800           | 0       | 208     |
| The Netherlands     | 420         | 2000  | 1000          | 0       | 1047    |
| Czech Republic      | 52          | 50    | 0             | 0       | 0       |

|                   |       |       |       |      |       |
|-------------------|-------|-------|-------|------|-------|
| Total for Others  | 18199 | 23850 | 16100 | 4020 | 10650 |
| Others not Listed | 315   | 500   | 1000  | 216  | 106   |
| Grand Total       | 18976 | 24800 | 17600 | 4672 | 10756 |

## Export Trade Matrix, Meat, Swine

|                     |             |       |               |         |         |
|---------------------|-------------|-------|---------------|---------|---------|
| Export Trade Matrix |             |       |               |         |         |
| Country             | Poland      |       | Units:        | Tons    |         |
| Commodity           | Meat, Swine |       | Partial Begin | January |         |
|                     |             |       | Partial End   | March   |         |
| Exports for:        | 2001        | 2002  | 2003          | 2001    | 2002    |
|                     | Full        | Full  | Full          | Partial | Partial |
| U.S.                | 6998        | 7000  | 8000          | 2146    | 1629    |
| Others              |             |       |               |         |         |
| Russia              | 39621       | 50000 | 55000         | 6065    | 5171    |
| Ukraine             | 2240        | 3000  | 3500          | 1021    | 174     |
| Byelorussia         | 4234        | 5000  | 5500          | 910     | 285     |
| Latvia              | 1904        | 2000  | 2200          | 259     | 152     |
| Moldovia            | 3279        | 6000  | 6500          | 113     | 434     |
| Estonia             | 2079        | 2000  | 2000          | 452     | 191     |
| Romania             | 2898        | 3000  | 3000          | 0       | 40      |
| Lithuania           | 1783        | 2500  | 2000          | 125     | 672     |
| Great Britain       | 1769        | 1800  | 1800          | 388     | 433     |
| Azerbaijan          | 1129        | 3000  | 2000          | 264     | 449     |
| Total for Others    | 60936       | 78300 | 83500         | 9597    | 8001    |
| Others not Listed   | 6907        | 5000  | 5000          | 1644    | 1174    |

|             |       |       |       |       |       |
|-------------|-------|-------|-------|-------|-------|
| Grand Total | 74841 | 90300 | 96500 | 13387 | 10804 |
|-------------|-------|-------|-------|-------|-------|

## Prices Table, Pork

|              |             |         |                        |
|--------------|-------------|---------|------------------------|
| Prices Table |             |         |                        |
| Country      | Poland      |         |                        |
| Commodity    | Meat, Swine |         |                        |
| Prices in    | zlotys      | per uom | kilogram of pork chops |
|              |             |         |                        |
| Year         | 2001        | 2002    | % Change               |
| Jan          | 14.35       | 14.46   | 0.77%                  |
| Feb          | 14.18       | 14.11   | -0.49%                 |
| Mar          | 14.2        | 13.93   | -1.90%                 |
| Apr          | 14.67       | 13.87   | -5.45%                 |
| May          | 14.71       |         | -100.00%               |
| Jun          | 14.57       |         | -100.00%               |
| Jul          | 14.67       |         | -100.00%               |
| Aug          | 14.7        |         | -100.00%               |
| Sep          | 14.73       |         | -100.00%               |
| Oct          | 14.72       |         | -100.00%               |
| Nov          | 14.54       |         | -100.00%               |
| Dec          | 14.44       |         | -100.00%               |
|              |             |         |                        |

|               |      |                         |  |
|---------------|------|-------------------------|--|
| Exchange Rate | 4.18 | Local currency/US<br>\$ |  |
|---------------|------|-------------------------|--|

Tariff Rate Table

| Tariff Number              | Product Description                | Applied Tariff | Basic Tariff                  |
|----------------------------|------------------------------------|----------------|-------------------------------|
|                            |                                    |                |                               |
| 102.10 0                   | Breeding Cattle                    | 0              | 5.0                           |
| 0201                       | Fresh or Frozen Beef               | 45             | 19 + maximum<br>3.03 EUR/kg   |
| 0210                       | Beef Products                      | 35             | 22 + maximum<br>3.12 EUR/kg   |
| 0206.10                    | Beef Offal                         | 20             | 12.8 + maximum<br>3.04 ECU/kg |
| 0504.00.00.9               | Beef Tripe                         | 15             | 19                            |
| 0203                       | Pork: fresh, chilled and<br>frozen | 30/3           | 76 + maximum<br>0.9 EUR/kg    |
| 1602.41 1602.42<br>1602.49 | Pork products                      | 40             | 102 + maximum<br>3.04 EUR/kg  |

1/ Applied tariff: used for MFN and WTO members if lower than conventional (basic) tariff;  
Basic or conventional tariff: maximum bound tariff.

2/ For UE, CEFTA, Latvia and Lithuania tariff is zero.

3/ Within the Quota

Average Meat Consumption (kilograms per capita )

|      | Pork | Beef | Poultry |
|------|------|------|---------|
| 1998 | 37.6 | 8.1  | 13.1    |
| 1999 | 39.6 | 7.8  | 13.9    |
| 2000 | 38.7 | 7.0  | 14.5    |
| 2001 | 38.2 | 5.5  | 16.5    |
| 2002 | 39.0 | 5.0  | 17.0    |